

Message Text

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ORIGIN COME-00

INFO OCT-01 AF-08 EUR-12 EA-09 NEA-10 ISO-00 OES-06 SIG-02
EB-07 NSF-02 DLOS-06 IO-13 AGRE-00 INT-05 TRSE-00
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STATE-EUR/WE:JLIMPRECHT 632-2633
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STATE-EA/K:PMAYHEW (SUBS)
STATE-EA/J:SECTON (SUBS)
STATE-EA/ROC:BLEVIN (SUBS)
STATE-EUR/RPE:PMC CLEAN 632-1606

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FM SECSTATE WASHDC
TO AMEMBASSY ROME
AMEMBASSY MADRID
AMEMBASSY PARIS
AMEMBASSY SEOUL
AMEMBASSY TOKYO
AMEMBASSY TAIPEI
AMEMBASSY LISBON
AMCONSUL CASABLANCA
AMCONSUL BREMEN
AMEMBASSY ANKARA
AMEMBASSY ATHENS
INFO AMEMBASSY COPENHAGEN
USMISSION EC BRUSSELS
AMCONSUL CAPE TOWN
AMEMBASSY NOUAKCHOTT
AMEMBASSY BONN

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E.O. 11652: N/A

TAGS: EFIS, XG, XE

SUBJECT: MARKETING INFORMATION REQUEST ON SQUID
PRODUCTS

1. IN RESPONSE TO A JOINT INDUSTRY-GOVERNMENT REQUEST
FROM THE NEW ENGLAND FISHERIES DEVELOPMENT PROGRAM

(NEFDP), THE NATIONAL MARINE FISHERIES SERVICE (NMFS), NOAA, COMMERCE, REQUESTS POST ASSISTANCE IN OBTAINING CURRENT INFORMATION ON THE SQUID FISHING, MARKETING, AND PROCESSING INDUSTRIES IN ITALY, SPAIN, PORTUGAL, THE FEDERAL REPUBLIC OF GERMANY, GREECE, TURKEY, FRANCE, JAPAN, REPUBLIC OF CHINA, REPUBLIC OF KOREA, AND AFRICAN COUNTRIES. SQUID IS AN UNDER-UTILIZED SPECIES IN THE UNITED STATES, AND FOREIGN INTEREST IN THE U.S. RESOURCES OF THIS SPECIES HAS BEEN GROWING STEADILY.

2. DURING THE FIRST 6 MONTHS OF 1976, SQUID LANDINGS IN MASSACHUSETTS AND RHODE ISLAND (THE TWO ATLANTIC STATES WHERE MOST SQUID IS CURRENTLY LANDED) AMOUNTED TO 2,000 METRIC TONS (4 MILLION LBS), OR DOUBLE THE 1,000 TONS LANDED DURING THE COMPARABLE PERIOD IN 1975. AN EVEN MORE SIGNIFICANT FACT:

THE AVERAGE U.S. PRICE OF LANDED SQUID HAS INCREASED TO OVER 23 CENTS PER POUND AT PRESENT, OR ALMOST DOUBLE THE 14 CENTS PREVAILING DURING 1975.

3. IN THE NORTHWEST ATLANTIC OFF THE NEW ENGLAND COAST (ICNAF CONVENTION AREA), SQUID RESOURCES ARE LARGE ALTHOUGH NOT YET PERFECTLY ASSESSED. NMFS SCIENTISTS BELIEVE THE MINIMUM STOCK ESTIMATES FOR UNCLASSIFIED

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1977 TO BE IN THE NEIGHBORHOOD OF 1.5 BILLION LOLIGO (OR BOSTON SQUID) INDIVIDUALS. ESTIMATES FOR THE ILLEX (OR SUMMER SQUID) SPECIES IS NOT AVAILABLE BECAUSE OF ITS WIDER RANGE. THE SCIENTISTS PREFER TO EXPRESS THEIR ESTIMATES IN TERMS OF INDIVIDUALS RATHER THAN WEIGHT BECAUSE SQUID GROW VERY RAPIDLY AND HAVE A SHORT LIFE SPAN.

4. THE HARVESTING CAPACITY OF THE U.S. INDUSTRY IS GROWING AND THE U.S. CATCH IS EXPECTED TO INCREASE IN 1977.

5. EUROPEAN MARKETS REPORTEDLY CONSUME ABOUT 100,000 TONS A YEAR OF FRESH OR FROZEN SQUID, TWO THIRDS OF WHICH IS SUPPLIED BY IMPORTS. MOST U.S. LANDINGS ARE SOLD ON EUROPEAN MARKETS. THE NEFDP IS CONCERNED THAT WITHOUT CURRENT MARKET INFORMATION, U.S. SUPPLIERS MAY OVERCOMMIT THEMSELVES OR UNDERPRICE THEIR GOODS.

6. NMFS WOULD APPRECIATE IF ALL ADDRESSEE POSTS COULD PROVIDE THE FOLLOWING MARKETING DATA TO THE EXTENT AVAILABLE:

A) MONTHLY SQUID LANDINGS FOR 1975 AND 1976 BY SPECIES, QUANTITY, AND VALUE. (THIS IS NOT YET AVAILABLE FROM FAO STATISTICS.)

B) CURRENT PRICES RECEIVED FOR SQUID LANDED BY DOMESTIC FISHERMEN OR IMPORTED FROM COUNTRIES SUCH AS KOREA, JAPAN, POLAND, USSR, ETC.

C) CURRENT INVENTORIES OF CANNED OR FROZEN STOCKS AND COMPARISON WITH PREVIOUS YEARS.

D) ANTICIPATED SUPPLY OF SQUID (FROM BOTH DOMESTIC UNCLASSIFIED

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LANDINGS AND FOREIGN IMPORTS) FOR THE REMAINDER OF 1976 AND THE FIRST HALF OF 1977.

E) PRODUCTION AND CONSUMPTION ESTIMATES AND/OR TRENDS, PRINCIPAL MARKETS, AND MAJOR PORTS OF ENTRY.

F) CURRENT EXPRESSIONS OF INTEREST IN SQUID PURCHASES BY MAJOR BROKERS AND IMPORTERS.

G) NAMES AND ADDRESSES OF PRINCIPAL BROKERS AND IMPORTERS.

7. NMFS WOULD APPRECIATE THE MOST CURRENT INFORMATION AVAILABLE, AS WELL AS ALERT REPORTING ON ANY FUTURE SIGNIFICANT CHANGES IN SQUID MARKETS. THE EUROPEAN SQUID FISHERY IS MOST ACTIVE IN THE FALL AND WINTER, WHILE THE U.S. FISHERY IS AT ITS PEAK IN THE SPRING.

8. ANY AVAILABLE REVIEW ARTICLES, NEWSPAPER CLIPPINGS, OR MARKET SURVEYS, BOTH PAST AND PRESENT, IN ANY LANGUAGE, WOULD BE APPRECIATED. PLEASE MAIL TO: F411, NMFS, NOAA, COMMERCE.

9. FOR CASABLANCA ONLY: NMFS NORTHEAST REGION REPORTS UNCONFIRMED RUMORS THAT THE 1975 AFRICAN SQUID SEASON WAS POOR. DATA AVAILABLE ON MAURITANIAN LANDINGS AT THE PORT OF NOUADHIBOU INDICATE THAT SQUID LANDINGS DECLINED FROM 1,150 METRIC TONS (T) IN 1974 TO 530 T IN 1975. THE SOUTH AFRICAN SQUID CATCH DECLINED FROM 1,317 T IN 1974 TO 839 T IN 1975. NMFS DOES NOT HAVE ACCESS TO OTHER 1975 AFRICAN CATCH DATA AND IS UNABLE TO CONFIRM THAT THE SQUID SEASON WAS POOR. NMFS WOULD GREATLY APPRECIATE ANY INFORMATION THE REGIONAL FISHERIES ATTACHE COULD OBTAIN ON 1975 AND 1976 SQUID CATCHES IN AFRICAN WATER. NMFS HAS PROVIDED RFA A TABLE CONTAINING FAO UNCLASSIFIED

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DATA ON AFRICAN SQUID CATCHES FROM 1970-1974. ALTHOUGH FAO DATA IS NOT COMPLETE, SQUID CATCHES OF 40,000 T WERE REPORTED IN 1972; 43,900 T IN 1973 AND 43,754 T IN 1974 OFF WESTERN AND SOUTHERN AFRICA. ANY ADDITIONAL INFORMATION RFA MAY HAVE ON THE SQUID FISHERIES OF AFRICAN COUNTRIES WOULD BE OF GREAT INTEREST.

10. FOR TOKYO ONLY: ACCORDING TO THE OFFICIAL JAPANESE "ANNUAL STATISTICAL REPORT ON FISHERIES AND AQUACULTURE PRODUCTION FOR 1974", LANDINGS OF ALL SPECIES OF SQUID IN 1974 TOTALED 469,933 T, AND 58,772 T OF THIS WAS TAKEN IN DISTANT WATERS. IN THE SAME YEAR, 44,763 T OF FROZEN WHOLE SQUID WAS IMPORTED; MAJOR EXPORTING NATIONS WERE SOUTH KOREA, SPAIN, AND THAILAND. KOREA AND THAILAND ALSO PROVIDED A TOTAL OF ABOUT 6,000 T (PRODUCT WEIGHT) OF PREPARED OR PRESERVED SQUID TO JAPAN. EMBASSY IS REQUESTED TO CONFIRM NMFS INFORMATION THAT DUTY ON FROZEN SQUID IMPORTS IS 10 PERCENT AD VALOREM, AND 15 PERCENT ON PROCESSED SQUID.

ACCORDING TO ICNAF STATISTICS, THE JAPANESE SQUID CATCH IN THE NORTHWEST ATLANTIC IN 1975 TOTALED ABOUT 11,000 T. THE CONSEQUENCES OF EXTENDED JURISDICTION FOR THIS JAPANESE FISHERY ARE NOT YET CLEAR. JAPAN MAY CONTINUE TO HAVE ACCESS TO SQUID RESOURCES OFF AFRICA AND NEW ZEALAND. U.S. FISHERMEN AND EXPORTERS ARE MOST INTERESTED IN THE LONG RANGE PROSPECTS FOR THE SUCCESSFUL PROMOTION OF U.S. SQUID EXPORTS TO JAPAN. DOES A MARKET NOW EXIST FOR INCREASED SQUID IMPORTS, AND DOES THE EMBASSY BELIEVE THAT U.S. FISHERMEN CAN ANTICIPATE CONTINUED JAPANESE IMPORTS IN FUTURE YEARS?

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11. FOR SEOUL ONLY: DURING A RECENT WASHINGTON VISIT OF CHU-MAN PARK, OVERSEAS MANAGER OF THE KOREA MARINE INDUSTRY DEVELOPMENT CORPORATION (KMIDC), (TELEPHONE 23-0081-7), THE WORLD SQUID SITUATION WAS DISCUSSED AT SOME LENGTH. PARK, WHO USED TO BE THE GENERAL MANAGER OF KMIDC'S CANARY ISLANDS OPERATIONS STATED THAT CANARY PORTS (PRIMARILY LAS PALMAS) ARE THE MOST IMPORTANT TRANSSHIPMENT BASES FOR SQUID CATCHES AND THAT EUROPEAN PRICES ARE IN FACT DETERMINED THERE. PARK CLAIMED THAT HIS COMPANY RECEIVES DAILY SQUID PRICE QUOTATIONS FROM ITS REPRESENTATIVE IN THE CANARY ISLANDS (NAME NOT GIVEN) AND OFFERED TO TRANSMIT SUCH DATA

THROUGH THE U.S. EMBASSY IN SEOUL. NMFS WOULD APPRECIATE IT IF THE POST COULD DETERMINE WHETHER PARK CAN IN FACT FURNISH SUCH DATA. IF HE CAN, AND IF THE DATA ARE VALUABLE, NMFS WILL THEN ARRANGE FOR DIRECT CONTACT BETWEEN KMIDC AND NEFDP.

12. FOR TAIPEI ONLY: NMFS HAS CORRESPONDED WITH ROC DIRECTOR OF THE OCEAN FISHERIES DEVELOPMENT ADMINISTRATION, MR. Y. C. LIU, REGARDING FISHERIES OF ROC. NMFS APPRECIATES EMBASSY OFFICER RAMSEY'S FISHERIES REPORTING AND REQUESTS HIS ASSISTANCE IN CONTACTING THIS OFFICIAL (TELEPHONE 7514047) TO REQUEST INFORMATION HIS OFFICE MAY HAVE ON WORLD SQUID MARKETS, PRICES, ROC OVERSEAS OPERATIONS, AND THE ROLE OF LAS PALMAS IN THE SQUID TRADE. NMFS ALSO CORRESPONDS WITH MR. C. T. CHUEH, FISHERIES DIVISION, JCRR (TELEPHONE 37541 EXT. 183), WHO MAY ALSO HAVE USEFUL INFORMATION.

13. FOR BREMEN ONLY: DURING THE RECENT VISIT OF MR. FRITZSCHE OF BREMERHAVEN, NMFS WAS ADVISED THAT THERE IS NO MARKET FOR SQUID IN FRG, THAT CONSUMERS UNCLASSIFIED

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DO NOT LIKE THE PRODUCT, THAT IMPORTS ARE SMALL, AND THAT NO FRG VESSELS CURRENTLY CATCH SQUID. SEVERAL YEARS AGO, TWO FRG TRAWLERS HARVESTED SQUID OFF THE ATLANTIC U.S. COAST, BUT HAD TO SELL THEIR CATCHES IN SPAIN AND ITALY BECAUSE OF LACK OF DEMAND IN FRG. IF THE CONSULATE GENERAL AGREES WITH ABOVE APPRAISAL, ONLY IMPORT DATA ARE NEEDED. NMFS WOULD ALSO LIKE TO EXPRESS ITS APPRECIATION TO THE CONSULATE GENERAL FOR EXCELLENT RECENT ALERT REPORTING ON THE LATEST FISHERY DEVELOPMENTS.

14. FOR PARIS ONLY: THE WOODS HOLE BIOLOGICAL LABORATORY OF NMFS IS CURRENTLY ENGAGED IN JOINT FISHERIES RESEARCH, INCLUDING SQUID, ABOARD THE FRENCH R/V CRYOS WITH TWO OF ITS SCIENTISTS.

15. FOR MADRID ONLY: IN VIEW OF RECENT STATEMENTS BY SPANISH OFFICIALS BITTERLY OPPOSING THE INCREASED HARVEST OF NORTHWEST ATLANTIC SQUID BY U.S. FISHERMEN, THE EMBASSY SHOULD USE ITS DISCRETION IN OBTAINING THE REQUESTED INFORMATION. IT IS INTERESTING TO NOTE, HOWEVER, THAT SPAIN, DESPITE ITS CURRENT PROTESTATIONS, DID NOT CATCH THE ICNAF QUOTAS IT WAS ALLOWED DURING 1975. THE QUOTAS FOR BOTH LOLIGO AND ILLEX SQUID WERE 13,000 T IN BOTH 1974 AND 1975. THE SPANISH CATCH OF BOTH SPECIES IN

ICNAF SUBAREAS 5 AND 6 HAS DECREASED FROM 17,599 T
IN 1973 TO 16,144 T IN 1974 AND ONLY 9,902 T IN 1975.

16. UNCLASSIFIED INFORMATION IS PREFERRED. IF
CLASSIFICATION APPEARS NECESSARY, PLEASE SEPARATE
THE TWO.
KISSINGER

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Message Attributes

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MADRID
PARIS
SEOUL
TOKYO
TAIPEI

LISBON
CASABLANCA
BREMEN
ANKARA
ATHENS INFO COPENHAGEN
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